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SUPPORT FOR ECONOMIC GROWTH AND ANALYSIS II (SEGA II)

2006 Third Quarter Progress Report

April 1 – June 30, 2006

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SUPPORT FOR ECONOMIC GROWTH AND ANALYSIS II

Quarterly Report April 1, 2006 – June 30, 2006

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INTRODUCTION

The Support for Economic Growth and Analysis and Mandela Economics Scholars Program II (SEGA II) began on August 27, 2004 and continues through August 26, 2007. SEGA II has been designed to support the Economics Capacity Strategic Objective of the USAID South Africa results framework. This third quarterly report for 2006 documents progress made towards achieving USAID's objectives for this program as reflected in the Statement of Work:

- Working with public sector agencies and civil society organizations to perform analyses that will improve the policy and regulatory environment; and contribute towards a reduction in poverty and unemployment within a supportive macro-economic environment.
- Working with these same institutions, and employing both formal and informal training mechanisms, to develop economic research and policy capacity in South Africa.
- Collaborate with other donors, in particular the UK's Department for International Development (DFID), in achieving these results.

SUMMARY OF ACHIEVEMENTS

A number of research activities were completed and the results disseminated during the third quarter of Fiscal Year 2006. SEGA II also hosted or participated in several high profile conferences and workshops and developed a new training program for building economic capacity within the National Treasury. Highlights from the second quarter include:

- Two large SIPP (Support for the Implementation of Pro-Poor Policies) projects were completed in this quarter. The three final reports on the evaluation of the national school feeding scheme and a draft report and model for projecting long-term social grant expenditure were delivered to Government.
- Work on a number of other SIPP projects is progressing well. This includes studies on rural poverty and vulnerability and the economics of South Africa's land reform programmes.
- The National Credit Act came into effect on 1 June 2006 and the responsibilities of the Micro Finance Regulatory Council have now been assumed by a new National Credit Regulator (NCR). Seg II and the NCR have prepared a large number of activities to assist in the implementation of NCR, some of which began this quarter. Much more work is expected to begin in this area over the next few quarters.

TECHNICAL AREAS

While the SEGA II statement of work is diverse, it is clearly unified by its focus on capacity development and a strong orientation towards poverty and unemployment. It identifies 10 technical areas covering a wide range of issues and clients. In each area, activities have been designed to enhance the capacity of government, its regulators, NGO's and universities to design and implement economic policy in South Africa. This is to be achieved through policy research, technical advice and a variety of short and longer term training modules. Progress, by each technical area and activity, is described below and summarized in Annex A.

TA 1: STRENGTHENING THE IMPACT OF PRO-POOR PROGRAMS (SIPP)

SIPP is co-funded by DFID and was established to assist the National Treasury (NT) to incorporate pro-poor concerns into its tax and spending programs. Specific projects are identified by the Treasury and submitted to NT's research committee (a panel of four Deputy Director Generals) for approval. The following SIPP projects have been implemented to date:

- a desktop analysis of the importance of the child support grant within different households and for household members and its possible impact on poverty alleviation (completed);
- a discussion paper on the calculation of poverty lines and the implication of different estimates for the measurement of poverty in South Africa (completed);
- a discussion and policy paper on the eligibility of people with chronic illnesses for disability grants (completed);
- a modeling workshop to assist the Government in planning, budgeting, and evaluating the economic impact of the World Cup 2010 soccer tournament (completed);
- the development of a demographic model to assist the National Treasury in projecting the long-term size and distribution of the government's major social grants (completed);
- a baseline study of the reach, targeting and effectiveness of the primary school nutrition program (completed – see box 1 below);
- an extensive and qualitative analysis of the patterns and determinants of poverty and vulnerability in rural South Africa (to be completed end-2006);
- a study of the economic impact of South Africa's various land and agricultural policy initiatives in four municipal pilot sites (to be completed end-2006).

In addition, SEGA II has contributed significant funding to a capacity building facility to enable National Treasury employees to participate in targeted economic training events in the USA and South Africa. Six employees have received financial assistance from this facility to undertake short-courses in the United States; nine received assistance to undertake short courses locally and the facility contributed towards the costs of the Treasury's representation at the CABRI (Collaborative Africa Budget Reform Initiative)¹ workshop in Mozambique.

¹ CABRI is a professional and autonomous network of senior government officials in ministries of finance *and* planning which aims to improve the efficacy of public finance management in Africa. The CABRI secretariat is located in the National Treasury of South Africa. For more detail see: <http://www.africa-sbo.org/cabri>

Box 1 Targeting the National School Feeding Scheme

The National School Feeding Scheme (NSFS) was introduced in 1994 as one of the Presidential lead projects under the Reconstruction and Development Programme. Its aim was to enhance the educational experience of needy primary school learners through promoting punctual school attendance, alleviating short term hunger, improving concentration and contributing to general health development.

Although the original aim was to feed 50 per cent or approximately 3.8 million needy learners, the actual number of learners targeted quickly exploded as the provinces were given the latitude to manage the programme regionally according to their chosen model of delivery. With the change of roles and responsibilities in managing the programme, the current target is set at reaching 60 per cent of the poorest primary school learners which amounts to approximately 4.5 million children.

Sega II was requested, by the National Treasury and Department of Education, to help design a baseline study for the evaluation of the NSFS. The researchers were specifically asked to consider the appropriateness and accuracy of the current national and provincial feeding targets.

This assessment found that the national target of the 60 per cent poorest primary school learners is a reasonable goal. Furthermore, provincial poverty and hunger shares analysis suggest that all but one province is receiving a “fair” share (based on these measures) of the conditional grant used for funding the NSNP.

Within province targeting was evaluated against each province’s stated targeting strategy, and the numbers of learners and schools targeted compared with the total number of schools and learners in each provincial quintile. This analysis shows that most provinces are feeding well beyond their respective minimum quintile ranges indicating a high degree of targeting imprecision. This is largely explained by the reluctance of government officials to remove schools from existing lists. A greater problem appears to exist in terms of poor schools that are not being targeted at all. The data indicates that approximately 25 per cent of the poorest three quintiles of schools in the Free State and KwaZulu-Natal were not being targeted in June 2005.

Excerpt from Poswell and Leibbrandt (2006)

TA 2: PARLIAMENTARY TRAINING

SEGA/MESP (implemented by Nathan Associates) provided extensive formal economic training to South African parliamentarians over the last 6 years and this support was continued by SEGA II. In 2005, SEGA II provided financial assistance to 31 parliamentarians registered for Honors in Economics courses and to 15 parliamentarians undertaking a Diploma in Economic Policy.

Funding for this training will be transferred to Parliament in mid-2006 and SEGA II agreed to contribute additional funding to enable those parliamentarians that have successfully concluded their 2005 exams to complete their Honors in Economics degree in the first semester of 2006. A total of 13 Parliamentarians qualified for this additional support and are currently enrolled in this course.

TA 3: MICROFINANCE POLICY REFORM

The Microfinance Regulatory Council (MFRC) aims to promote sustainable growth of the micro-lending industry and to ensure the protection of consumer rights. SEGA II (with funding from PRIME) has assisted the MFRC in these areas by providing support to the implementation of the new National Credit Bill and Act. In December 2005 this bill was

approved by Parliament and the new Act and National Credit Regulator came into force on 1 June 2006. The primary objectives of the NCR are to regulate credit markets, enforce truth in lending and protect consumers from reckless lending.

SEGA II / PRIME has been deeply involved in the transformation of this legislation and the responsible regulators. An IT consultant was contracted this quarter to adapt and convert the MFRC's IT systems to comply with the new structure and needs of the NCR. The project will also fund the development of various information booklets, explaining the objectives and implications of the new act for creditors, debt counselors and consumers. These booklets will be prepared, translated and published over the next few months. In addition, a consultant has been identified to assist the NCR in the development and implementation of a wider communications strategy.

To supplement the PRIME funds, SEGA II will continue to provide technical assistance and research support to the NCR with general funding. Several new activities are planned for next quarter:

- The evaluation process has been completed to select a sub-contractor to assist the NCR with the development of their policies and procedures.
- An independent consultant has been selected to oversee the design and implementation of the National Credit Register.
- The need for a legal advisor is being evaluated.
- A strategic plan for research into credit insurance is being formulated.

TA 4: AGRICULTURE AND LAND REFORM

The Human Sciences Research Council together with the Programme for Land and Agrarian Affairs has been contracted to evaluate the interactions between land reform and rural development in South Africa. The main objective of this study is to clarify the economic case for redistributive land reform in the context of a rapidly changing agricultural economy. The two case study reports were completed this quarter and presented to the Treasury in July. Final reports and policy recommendations will be delivered in Quarter 4 and will be summarized in the next quarterly report. There is also some possibility that the Treasury will request that Seg II fund additional case studies in another 2 provinces.

TA 5: HIV/AIDS

South Africa has one of the fastest growing HIV/AIDS epidemics in the world. By 2001, the adult prevalence rate reached 20.1 percent with more than 5.0 million people infected and 50,000 new infections per month. It is now broadly accepted that this pandemic will have an adverse impact on the economy, leading to rising poverty and inequality, but many of the channels through which this will occur remain largely unexplored.

SEGA II tackles two broad areas of work on the economics of HIV/AIDS. Firstly, the program supports analysis of the impact of HIV/AIDS on the macro-economy and different industry sectors. A comprehensive macroeconomic analysis of the impact of HIV/Aids under alternative intervention scenarios was completed last quarter (with co-funding from DFID).

Secondly, SEGA II assists government in costing and monitoring the impact of HIV/AIDS on health care workers and the delivery of basic care and treatment to HIV/AIDS patients, orphans and vulnerable children (OVC). A study on stress and burnout among professional nurses in the Free State Province is ongoing. Furthermore, tenders were awarded in this quarter for three new PEPFAR-funded projects that will contribute towards the development of a data system for OVCs in South Africa. This includes assistance to 6 NGOs involved in OVC work to enable them to present their 'stories' at a national OVC conference; a review of lessons learnt from previous studies and policy interventions in the area of OVC in South Africa and internationally; and an evaluation of existing government and non-governmental databases and systems to record OVCs in South Africa and select developing countries.

TA 6: REGULATORY REFORM

SEGA II has initiated discussions with the Presidency and the Department of Trade and Industry with a view to providing technical assistance and capacity building support in this area over the next few years. The focus of this assistance will be on the impact of regulations and competition on small businesses. Already, a tender has been issued and awarded to identify policy and research gaps in this area in South Africa. Work on this project is expected to begin in the next quarter and will contribute to the development of a longer-term SMME research program with the Department of Trade and Industry.

TA 7: ENVIRONMENTAL ECONOMICS POLICY

There is unlikely to be any work in this TA over the duration of the project. SEGA II will continue to monitor developments in this area and will inform USAID if any prospective activities arise for future consideration.

TA 8: INTELLECTUAL PROPERTY RIGHTS

There is unlikely to be any work in this TA over the duration of the project. SEGA II will continue to monitor developments in this area and will inform USAID if any prospective activities arise for future consideration.

TA 9: SUPPORT FOR HIGHER EDUCATION

SEGA/MESP II provides foreign (MESP I) and local (MESP II) bursaries to South African economic students. A comprehensive report on the status of all SEGA II-funded MESP students is attached as a deliverable.

There are four remaining MESP II students completing their PhDs in Economics through the Universities of Rhode Island, Michigan State, Massachusetts and Colorado. Two of these students submitted their theses in 2005 and have returned to South Africa (they will need to return to the USA for their defense). The other two are expected to submit their thesis and return to South Africa by end July 2006.

The 25 remaining MESP II students are located at the Universities of Stellenbosch, Kwa-Zulu Natal (UKZN) and Cape Town (UCT). Most of these students (23) completed their course work in 2005 and were awarded a supplementary bursary to write up their theses. Six

students from Stellenbosch who were on the supplementary bursary have completed and passed their thesis (two graduated in December 2005, three in April 2006 and one is confirmed to graduate in December 2006). Another two students from Stellenbosch are currently completing their course work and are also expected to graduate in December 2006. The remaining 17 scholars on supplementary bursaries are expected to submit their thesis by the end of this quarter and graduate in December 2006.

SEGA/MESP has also supported the University of the Western Cape as a 'Center of Economic Excellence (CEE)'. Funding for this activity will end in the second quarter of this financial year.

TA 10: COMPLEMENTARY ACTIVITIES

The above technical areas cover most of the key aspects of poverty and unemployment in South Africa, but not all. Notable exceptions include private sector and small business development issues and the impact of globalization on trade, investment, employment and the poor.

SEGA II has worked with South Africa's largest trade union federation (COSATU) to assist them in developing a research proposal to understand the impact of trade reform on the poor. DFID and the DTI have agreed to contribute significant funding to this project, which now includes 16 sub-components and about 20 different researchers. Research work is complete and the results were presented to COSATU and DTI in this quarter (the main conclusions are summarized in Box 2). Final papers are currently being prepared for broader dissemination.

To assist private sector development, SEGA II is providing ongoing advice to the National Treasury on the costs and benefits of different kinds of industrial policy instruments. This includes a review of sector specific interventions as well as proposal on a number of cross-cutting economic constraints. A final paper by Frank Flatters and Matthew Stern has been delivered to the Treasury. This activity was co-funded by USAID/RCSA in Botswana. An indicator of the value placed on this analysis is the fact that SA National Treasury has retained Frank Flatter's services as a policy and capacity building advisor within the economic policy division of National Treasury over the next 14 months.

Finally, SEGA II continues to enhance economic capacity within and beyond Government through focused short-term assistance and training. During this quarter, SEGA provided funding to the Southern African Tax Institute to assist them in funding the 2006 SATI Winter Tax Program, a course designed to enhance the skills of senior public officials from national, regional or local treasuries and revenue agencies.

Box 2 Trade and Poverty in South Africa

South Africa is currently engaged in various trade negotiations at the multilateral, regional and bilateral level. The net impact of the resulting trade reforms should be to contribute to growth, employment and raising average incomes. But this net impact conceals a range of differential effects: the benefits of reform do not accrue automatically and equally to all households or communities, and in some cases poverty and unemployment may rise. More recently, the rapid depreciation and then appreciation of the rand have introduced a new source of change which has exceeded movements in tariffs. Policy makers need to be aware of these different effects and implement trade reforms in a way that maximizes the benefits for the poor.

The objective of the South Africa Trade and Poverty Research Project is to analyse the impact of specific trade reforms on poverty in South Africa. The methodological framework guiding the project is drawn from McCulloch, Winters and Cirera (2001), who describe the various linkages through which trade reform affects prices, consumption, production, and employment. The study explores these linkages through a combination of quantitative research techniques, five case study reports and a computable general equilibrium analysis.

Overall, a number of broad conclusions can be drawn from the current round of studies under the Trade and Poverty Research Project. Increased openness has contributed to significant output and productivity gains at the enterprise level; and has reduced the cost of living for all households. Most importantly, the study finds that trade liberalisation is an important source of welfare gain and growth to the economy as a whole. The study confirms that the effect of trade liberalisation is not uniform across households and industrial sectors. There are both winners and losers in the process. Trade liberalization has created new opportunities for exports and growth in services, but has also led to the decline in output and employment in many inefficient and import competing sectors.

This makes it difficult to measure the net impact of liberalisation on the poor. Whereas poor consumers have gained most from lower tariffs, they have not gained (or lost) much in terms of employment. This is partly because poor households are largely disconnected from the formal wage economy and labour income in the traded sectors does not overlap geographically with the employed poor; partly because economic and export growth has been insufficient to draw new entrants into the labour market; and partly because trade liberalisation in South Africa is far from complete and tariff peaks and sector specific programmes continue to impede competitiveness.

The analysis and case studies show that further trade and industrial reform is feasible and would contribute to improved productivity and economic growth; it acknowledges that this is not sufficient to reduce unemployment and poverty especially amongst the unskilled and rural poor.

Excerpt from Edwards and Stern (2006)

BENCHMARKS

The following table provides a summary of the key objectives and results for SEGA II, as established by USAID and included in the Task Order. Existing targets, taken from the Performance Monitoring Plan for USAID/South Africa's Economics Capacity Building Strategic Objective, have been added to show some of the proposed contributions of SEGA II and to facilitate USAID monitoring of the progress of the project.

	<i>Objectives</i>	2005 (Aug-27-2004 to Aug-26-2005)		2006: Quarter 3	
		<i>Anticipated results</i>	<i>Proposed Targets</i>	<i>Cumulative Performance</i>	<i>Comment</i>
Sustainable capacity-building	Strengthen human resources in economics and policy	Number of historically disadvantaged people completing long term advanced degrees and placed in jobs as economists	N/A	N/A	MESP ended
		Number of people selected for training	N/A	N/A	MESP ended
		Gender Equity – percent women trained	N/A	N/A	MESP ended
		Proportion of graduates working for government	N/A	N/A	MESP ended
	Strengthen centers of economic excellence in teaching and research at historically disadvantaged universities.	Full-time equivalent students	N/A	N/A	Program ended
		Outreach programs with govt, Parl., bus., NGOs	N/A	N/A	Program ended
		Quality Research papers	N/A	N/A	Program ended
Assessments and analyses	Strengthen government departments that deal with policy matters.	Number of directorates strengthened	5	12	
		Number of quality policy studies completed	30	7	
		People in economics training	200	154	
		Gender Equity – Women in Training	40%	31%	48 females / 154
	Strengthen think tanks to formulate and deal with economic policy options.	Number of quality studies produced	10	4	
		Number of seminar, conferences, and workshops attended by think tanks.	8	8	
		Black professionals working on assisted activities	20	36	13 economists
		Gender equity – professional women working on assisted activities	12	36	13 economists 23 non-economists

DELIVERABLES

The following deliverables were prepared during the period April 1, 2006 – June 30, 2006.

Technical Area	Activity	Date	Document title. Type
SIPP	Social grants projections	May 2006	Socialgrants.doc
SIPP	Primary School Nutrition Program	June 2006	NSNP_Report1_Targeting.doc NSNP_Report2_Evaluation.doc NSNP_Report3_Sampling.doc
Complementary	Trade and poverty	May 2006	Wheat final May.doc
HIV/AIDS	Macroeconomic impact analysis	April 2006	BER Macro Impact of HIV AIDS.doc
Complimentary	SATI	June 2006	SATI 2006 Brochure.doc

ANNEX A: SUMMARY OF ACTIVITIES

Project	Description	Objective	Indicative Budget \$	Status
<i>TA1: Strengthening the Impact of Pro-poor Programs (SIPP)</i>				
Poverty workshop	Discussion of key research questions and gaps, between leading academics and senior policy makers	To promote evidence-based policy making	15 000	Postponed
Intra-household dynamics in resource allocation	Analysis of the flows of social grants to different types of households and the impact of these grants on household members	To evaluate the allocation and effectiveness of social grants	30 000	Completed
Poverty line	Review of methodologies for calculation of poverty lines and the implications of different estimations for the measurement of poverty in South Africa	To assist Government in the determination of an appropriate measure	10 000	Completed
CGE Micro-simulation	Technical assistance to National Treasury modeling unit	To assist NT in the development of a CGE Micro-simulation model	75 000	Initial TA completed
Land-based vulnerability, labor markets and social protection	Analysis of the patterns and determinants of vulnerability and food security in rural South Africa; and a review of government policies in these areas	To recommend new and better policies	295 000	Approved and work has begun Interim report received
Primary School Nutrition Program	Baseline study and evaluation of the reach and effectiveness of the government's school feeding scheme	To provide baseline data for future M&E	175 000	Completed
Social grants projections	Examination of population dynamics and the likely evolution of the economic position of welfare beneficiaries	To estimate the cost and improve targeting of social grants	60 000	Completed
Rural municipality case studies	Analysis of the economic impact of land reform projects in four pilot sites.	To clarify the economic case for land reform	200 000	Interim reports received
Economic Analysis	Work with NT officials to develop analytical spreadsheets, develop a set of tools to evaluate policies	Capacity Building economic analytical skills with NT officials	240 000	In progress
<i>TA2: Parliamentary training</i>				
Parliamentary training	Formal economic training and support to Parliamentarians, especially the Budget Committee.	To improve economic knowledge and capacity in Parliament	150 000	Final installment to be paid Q2 2006
<i>TA3: Microfinance policy reform</i>				
Consumer Credit Act	Evaluation of credit conditions and interest rates in different consumer credit markets	To recommend methodology for determination of	60 000	Approved and work has begun

Project	Description	Objective	Indicative Budget \$	Status
		interest rate ceilings		
Long-term adviser on Microfinance Policy	Design and implementation of National Credit Regulator (NCR) and development of framework for credit providers	To assist in the design of a regulatory regime for the NCR	100 000	Completed
IT Technical Assistance	Check and Assist specifications for system, arrange feedback between users, evaluate and test system	To support the IT Infrastructure as the MFRC transforms in NCR	70 000	In Progress
TA4: Agriculture and land reform				
Evictions - national survey	National survey of incidence and socio-economic impact of farm evictions	To inform policy on land evictions and highlight vulnerable communities	150 000	Completed
TA5: HIV/AIDS				
Home and Community Based Care (HCBC)	Assessment of characteristics, cost and efficiency of different HCBC models	To recommend appropriate models for scaling up HCBC programs	190 000	Completed
Impact of HIV/AIDS on health care workers	Analysis of the prevalence of HIV/AIDS amongst professional nurses its impact on attrition and productivity	To assist in human resource development and planning	85 000	Completed
Macroeconomic impact study	Evaluation of the economic impact of HIV/AIDS, by sector	To demonstrate the economic cost of HIV/AIDS	20 000	Completed
SA Journal of Economics	Publication of special edition focusing on the economics of HIV/AIDS	To publicize research in this area	20 000	Completed
HIV/AIDS and Poverty Workshop	Conference on the relationship between HIV/AIDS and poverty	To improve data and research on HIV/AIDS	20 000	Completed
Health Economics Roundtable	Forum for health economists to present research and identify research priorities.	To improve research coordination and collaboration	10 000	Completed
Roll-out of ARV treatment in the Free State Province	Monitoring and evaluation of the roll-out of ARV treatment at specific pilot sites	To highlight progress and obstacles to ARV roll-out	150 000	Started Nov 2005 On going
OVC –Media Stories and Documentary	Help NGOs caring for OVCs to reflect on their own experiences and document lessons learned; prepare a short documentary film of one selected site	To assist OVC organizations to prepare presentations for conference	35 000	In progress
OVC – Lessons learnt	Review of research done, policies in place and interventions implemented on OVCs in Southern Africa	To assist DSD in development of an OVC data system	35 000	Tender issued

Project	Description	Objective	Indicative Budget \$	Status
OVC – Data systems	Review information on OVC data systems established in South Africa and internationally	To assist DSD in development of an OVC data system	75 000	Tender issued
TA9: Support for higher education				
MESP 1	Provision of bursaries and support to South African students to undertake post-graduate studies in the USA	To facilitate post-graduate education in economics amongst historically disadvantaged students	-	To end mid-06
MESP 2	Provision of bursaries and support to select academic departments and courses	To facilitate post-graduate education in economics amongst historically disadvantaged students	130 000	To end mid-06
UWC / Center of Economic Excellence (CEE)	Financial support and assistance to the economics department at UWC	To develop and sustain a CEE at UWC	35 000	To end Mid-06
Placements and internships	Assistance to MESP graduates in finding employment in Government departments or agencies	To help graduates find permanent and appropriate employment	10 000	Ended Dec 05
TA10: Complementary activities				
Development through trade	Provision of support to South African Institute of International Affairs' (SAIIA) trade research and advocacy program	To inform policy makers and business leaders on trade policy developments	35 000	Completed
Trade training for union leadership	Facilitation of two workshops on trade theory and policy for union leadership	To inform union members and leaders on trade policy developments	50 000	Completed
Southern Africa Tax Institute (SATI)	Support to SATI training courses	To enhance tax knowledge amongst policy makers	10 000	Completed
Industrial policy and incentives	Analysis of the relative impact of investment incentives and other investment support initiatives on business decisions and investment	To inform policy makers on optimal investment policy	60 000	Completed
Trade and poverty	Various household and case study analyses of the relationship between trade and poverty.	To understand the way in which trade impacts upon poverty in SA.	50 000	Completed